

Business Services Online Tutorial

How to use W-2 Online

Lesson 1: Create W-2s

Step 1: Select 'Login' link from the Business Services Online Welcome Page.
www.ssa.gov/bsowelcome.htm

Step 2: The Business Services Online Home Page will display. Select the Create W-2s' link.



Step 3: The W-2 Online Information page will display. If you would like to download Adobe Acrobat Reader 5.0, select '[follow this link](#)'. If you do not need to download Adobe Acrobat Reader, continue to Step 4.



W-2 Online Information

W-2 Online lets you enter and submit up to 20 Forms W-2 to the Social Security Administration. You may not use W-2 Online if any of the restrictions below apply to you.

You will need **Adobe Acrobat Reader** (version 5.0 is recommended) to print your Form W-3 and Forms W-2. [Follow this link](#) to go to Adobe's free download page.

BEFORE CONTINUING, YOU MUST:

- ◆ Read all restrictions carefully.
- ◆ Verify your registration information.
- ◆ Specify whether you are filing for yourself or another company.

When you have finished, select the **Continue** button at the bottom of this page.

RESTRICTIONS

DO NOT use W-2 Online if you are:

- ◆ Filing third-party sick pay recap forms.
- ◆ Filing as a Form 2678 Agent or a Common Paymaster.
- ◆ Filing Forms W-2C.
- ◆ Filing for a tax year other than 2002.
- ◆ Filing Forms W-2 that include more than four Box 12 codes.
- ◆ Filing for wages earned in American Samoa, Guam, Puerto Rico, the Northern Mariana Islands, or the Virgin Islands.
- ◆ Filing for United States military wages or using a military Employer Identification Number (EIN)

Note: Using this service does not relieve employers of the obligation to provide annual wage statements to employees and state and local jurisdictions. Form W-2 must be distributed to employees no later than January 31, 2003

REGISTRATION INFORMATION

You provided the following contact information when you registered to use Business Services. **This information will be saved with your annual wage report** so that we can contact you if questions arise. Please check to be sure this information is correct.

Your Company's Name: **KEY SERVICE SYSTEMS**
Your Company's EIN: **06-1259340**
Your Name: **PATRICIA ORTALE**
Your Address: **103 COUNTRY CLUB DRIVE
GLEN BURNIE, MD 21060**
Your Phone: **4104969637**
Your Extension: **<Not Specified>**
Your Fax: **<Not Specified>**
Your E-Mail: **<Not Specified>**

If the above registration information is no longer accurate, please [follow this link](#) to update it.

FOR WHOM ARE YOU FILING?

Please choose one of the following options:



- ☐ I am filing Forms W-2 for my company's employees.
☐ I am filing Forms W-2 for another company's employees.

Options	
Warning! You logged in using your Social Security Number instead of your password. Therefore, any incomplete W-2 Online reports will NOT be saved for future use. You will have to enter the entire report later if you do not successfully finish your W2 Online report within this session.	
Continue	Continue with W-2 Online. Read Privacy Act and Paperwork Reduction Act Notice.
Cancel	Abandon your changes and return to the BSO home page.
<small>Privacy Act and Paperwork Reduction Act Notice. We ask for the information on Forms W-2 and W-3 to carry out the Internal Revenue laws of the United States. We need it to figure and collect the right amount of tax. Section 6051 and its regulations require you to furnish wage and tax statements to employees and to the Social Security Administration. Section 6109 requires you to provide your employer identification number. Routine uses of this information include giving it to the Department of Justice for civil and criminal litigation, and to cities, states, and the District of Columbia for use in administering their tax law. If you fail to provide this information in a timely manner, you may be subject to penalties. You are not required to provide the information requested on a form that is subject to the Paperwork Reduction Act unless the form displays a valid OMB control number. Books or records relating to a form or its instructions must be retained as long as their contents may become material in the administration of any Internal Revenue law. Generally, tax returns and return information are confidential, as required by section 6103. The time needed to complete and file these forms will vary depending on individual circumstances. The estimated average times are: Form W-2 -- 30 minutes, and Form W-3 -- 29 minutes.</small>	

Step 4: Review the Registration Information.

Step 5: Answer the question ‘For whom are you filing?’ by selecting the appropriate response. After reading the Privacy Act and Paperwork Reduction Act notice, select ‘Continue’ to proceed to the next screen. If you wish to end this session, select ‘Cancel’.

Step 6: Enter your employer information.

**Social SecurityOnline**
Business Services Online

W-2 Online - Help

W-2 Online Employer Data

Please fill in your information below:

Contact the Internal Revenue Service if you need assistance with providing the information requested on this form.

Fields marked with an asterisk (*) MUST be completed.

Employer's Information

Employer Identification Number (EIN) * : 760080808

Employer's Name * : BURNETT COMPANIES CONSOLIDATED INC

Employer's Address

Suite/Attn.: 9800 RICHMOND SUITE 80

Street/P.O. Box:

City * : HOUSTON

Please enter a U.S. Domestic Address OR a Foreign Address

Country * : United States

State Abbreviation (for U.S.) / Province * : TX

Zip / Postal Code * : 77042 Zip Ext. (U.S. Only) 4585

Other EIN used this year :

Kind of Payer * :

☐ 941 (Regular) ☐ 943 (Agriculture) (Note: Military payers cannot file using this service)
☐ CT-1 (Railroad) ☐ Hshld. emp. ☐ Medicare govt. emp. (For Government EINs ONLY!)

Warning! Be sure to select the appropriate "Kind of Payer". You will NOT be given an opportunity to change your selection later.

☐ Third-party sick pay

Establishment Number:

W3 Control Number:

Contact Person

Name * : MARY RUSSELL

Email Address: j1i10JHh@uhn.com

Telephone Number: 4107884444 Ext:

Fax Number:

Options

Continue

Continue with W-2 Online.

Cancel

Abandon your changes and return to the BSO home page.

(Note: All fields marked with an asterisk must be completed.)

Step 7: Select ‘Continue’ to advance to the next page. Select ‘Cancel’ to exit.

Step 8: Enter your W-2 data following the guidelines for completing paper Forms W-2.



W-2 Data

Fields marked with an asterisk (*) MUST be completed.					
a Control Number		For Official Use Only OMB No. 1545-0008			
b Employer identification number 76 - 0080808		1 Wages, tips, other compensation \$		2 Federal Income Tax withheld \$	
c Employer's name, address, and ZIP code ANYTHING BALTIMORE, MD 12345		3 Social security wages \$		4 Social security tax withheld \$	
		5 Medicare wages and tips \$		6 Medicare tax withheld \$	
		7 Social security tips \$		8 Allocated tips \$	
d Employee's social security number *		9 Advance EIC payment \$		10 Dependant care benefits \$	
Employee's Name Information e Employee's first name, middle initial, last name and suffix first: * middle: last: * suffix:		11 Nonqualified plans: Section 457 distributions or contributions \$		12a code: \$	
		Not Section 457 distributions or contributions \$			
Employee's Address f Employee's address Suite/Attn.: Street/P.O.Box: City: * US Address OR Foreign Address: Country: * United States State / Province: * Zip / Postal Code: * Zip Ext (u.s. only):		13 Statutory employee Retirement plan Third-party sick pay		12b code: \$	
		14 Other Description Amount \$		12c code: \$	
		Description Amount \$		12d code: \$	
15 Employer's state ID number	16 State wages, tips, etc.	17 State income tax	18 Local wages, tips, etc.	19 Local income tax	20 Locality Name

Options	
New W2	Keep this W-2 and create another W-2.
Done	Keep this W-2 and review a list of W-2s you have entered.
Cancel	Abandon this W-2 and review a list of W-2s you have entered.

Step 9: Select 'New W-2' to keep this W-2 information and create another W-2. Select 'Done' to keep this W-2 information and proceed to the W-2 review screen. Select 'Cancel' to delete this W-2 information

Step 10: After you select 'New W-2' or 'Done', you may receive an Alert. If so, you will need to review your data and make any corrections or select an override response for each Alert. Then select 'Done' or 'New W-2' to continue.

W-2 Data

A review of this W-2 has generated the following alerts.


Please review the data associated with the alerts and make any corrections necessary.

Name and SSN Mismatch Alert :
 The Name and SSN you provided does not match our records. Please verify that the name and SSN exactly match the name and SSN on the employee's Social Security card. If you are sure the SSN and Name are correct, check the box below then select a button at the bottom of this page to continue processing this W-2.
☐ Check this box if the SSN and Employee name data provided is correct according to the Employee's Social Security Card and your payroll records.

Social Security Tax Rate Alert:
 The Social Security tax rate for 2001 is 6.2%. The Social Security tax withheld (Box 4) on \$ 80,300.00 (Box 3 + Box 7) should be \$ 4,978.60. If you are sure the Social Security wages (Box 3), tips (Box 7) and tax withheld (Box 4) amounts are correct, check the box below then select a button at the bottom of this page to continue processing this W-2.
☐ Check this box if the Social Security wages, tips, and tax withheld data provided is correct.

Medicare Tax Rate Alert:

Step 11: You can view or edit your data by selecting 'View/Edit' under Options. If you want to delete the W-2 data, select 'Delete' under Options.


Social Security Online
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[W-2 Online - Help](#)

W-2 Data Review

This wage report is being prepared for:

EIN: 76-0080808

BURNETT COMPANIES CONSOLIDATED INC
 9800 RICHMOND SUITE 80
 HOUSTON, TX 77042-4595



#	SSN	Name	Options
1.	111-11-4545	KJJD FDF	<div style="text-align: center;"> View / Edit #1 Delete #1 </div>

Options	
New W-2	Create another W-2.
Edit Employer Info	Change the employer information you entered.
Go to W-3	View your Form W-3 totals. From here you can submit your wage report, print your wage report, or return to the W-2 Data Review page.
Save & Quit	Exit W-2 Online without finalizing your annual wage report. Your employer information and Forms W-2 will be saved until 12/31/2002. <i>Note: This is not an extension of your filing deadline.</i>
Quit without Saving	Exit W-2 Online without finalizing your annual wage report. Your employer information and Forms W-2 will NOT be saved!

Step 12: You can select one of the following options: New W-2, Edit Employer

Info, Go to W-3, Save & Quit, or Quit without Saving.

Step 13: After selecting 'W-3' to submit your wage data, your Form W-3 will display for your review.

W-3

a Control Number		For Official Use Only OMB No. 1545-0008	
b Kind of payer 941 - Regular		1 Wages, tips, other compensation \$78,000.00	2 Federal Income Tax Withheld \$0.00
		3 Social security wages \$0.00	4 Social security tax withheld \$0.00
c Total number of Forms W-2 1	d Establishment number	5 Medicare wages and tips \$0.00	6 Medicare tax withheld \$0.00
e Employer identification number 76-0080808		7 Social security tips \$0.00	8 Allocated tips \$0.00
Employer's name, address, and ZIP code BURNETT COMPANIES CONSOLIDATED INC 9800 RICHMOND SUITE 80 HOUSTON, TX 77042-4585		9 Advance EIC payment \$0.00	10 Dependant care benefits \$0.00
		11 Nonqualified plans \$0.00	12 Deferred Compensation \$0.00
		13 For third-party sick pay use only	
		14 Income tax withheld by payer of third-party sick pay \$ 0 .00	
h Other EIN used this year			
15 State Employer's state ID number MD 456415154		16 State wages, tips, etc. \$ 22000 .00	17 State income tax \$ 1600 .00
		18 Local wages, tips, etc. \$ 7800 .00	19 Local income tax \$ 4540 .00
Contact person MARY RUSSELL		Telephone number 4107884444	
E-mail Address		Fax Number	

Options


Under penalties of perjury, I declare that I have examined this return and accompanying documents and, to the best of my knowledge and belief, they are true, correct, and complete. By Pressing the "Submit Wage Report" button below I affirm that the above statement is true and wish to submit my annual wage report to Social Security Administration now.

<div style="border: 1px solid black; padding: 10px; margin: 10px auto; width: 80%;">Submit Wage Report</div>	<p>Submit this wage report to the Social Security Administration.</p> <p>Your Form W-3 must reconcile with the Forms 941, 943, or Schedule H that you filed with the Internal Revenue Service.</p> <p><i>Note: You will be given an opportunity to download a data file needed to print your Form W-3 and Forms W-2.</i></p>
<div style="border: 1px solid black; padding: 10px; margin: 10px auto; width: 80%;">Print Wage Report</div>	<p>Print your unsubmitted wage report.</p> <p><i>Note: Selecting this option will not submit your wage report to the Social Security Administration</i></p>
<div style="border: 1px solid black; padding: 10px; margin: 10px auto; width: 80%;">Return to W-2</div>	<p>Return to the W-2 Data Review Page to review and/or edit your wage report.</p>


Step 14: If you want to submit your wage information', select 'Submit Wage Report'.
If you would like to print or preview your wage report prior to submitting it to

SSA, select 'Print Wage Report'. If you want to edit your data, select 'Return to W-2'.

Step 15: (Print Wage Report) - The Print Acknowledgement page will display after selecting 'Print Wage Report'.



Social Security Online
Business Services Online



W-2 Online - Help

Print an Unsubmitted W-2 Online Wage Report Date: 11/11/2003 Time: 10:24 AM

Your annual wage report has NOT been submitted to the Social Security Administration.

You can view or print your Form W-3 and Forms W-2 using Adobe Acrobat Reader 3.0 or higher (5.0 is recommended). If the above software is already installed on your computer, select the Print Preview link below to open it with Acrobat Reader. If the above software is not installed on your computer, right-click on the Print Preview link (or tab to it and press Shift + F10) and select Save As to save your Form W-3 and Form W-2 information on your computer. Depending on your configuration, this download could take 5 minutes or longer. After you have saved your file, [Follow this link](#) to download Acrobat Reader from Adobe's free download page.

[Print Preview](#)

Options	
Under penalties of perjury, I declare that I have examined this return and accompanying documents and, to the best of my knowledge and belief, they are true, correct, and complete. By Pressing the "Submit Wage Report" button below I affirm that the above statement is true and wish to submit my annual wage report to Social Security Administration now.	
<div>Submit Wage Report</div>	Submit this wage report to the Social Security Administration. Your Form W-3 must reconcile with the Forms 941, 943, or Schedule H that you filed with the Internal Revenue Service. <i>Note: You will be given an opportunity to download a data file needed to print your Form W-3 and Forms W-2.</i>
<div>Return to W-3</div>	View your Form W-3 totals. From here you can submit your wage report, print your wage report, or return to the W-2 Data Review Page.
<div>Return to W-2</div>	Return to the W-2 data review page to review and/or edit your wage report.
<div>Save & Quit</div>	Exit W-2 Online without finalizing your annual wage report. Your employer information and Forms W-2 will be saved until 12/31/2002. <i>Note: This is not an extension of your filing deadline.</i>
<div>Quit without Saving</div>	Exit W-2 Online without finalizing your annual wage report. Your employer information and Forms W-2 will NOT be saved!

Step 16: If you do not have Adobe Acrobat Reader on your computer, you can download it by selecting 'Follow this link' near the top of the page. If you already have the software on your computer, you can go to **Step 18**.

Step 17: (Print/Preview Page) - Select the 'Print Preview' link at the top of the page. The W-2 Forms will display. You can print the forms. After printing or viewing the forms, close the window.

The screenshot shows a web browser window with the File menu open. The menu options are: New, Open... (Ctrl+O), Edit, Save (Ctrl+S), Save As..., Page Setup..., Print... (Ctrl+P), Send, Import and Export..., Properties, Work Offline, and Close. The browser's address bar shows 'ows/w2o011.pdf'. The main content area displays a W-2 form (Form W-3 Transmittal of Wage and Tax Statements) for the year 2001. The form includes fields for Employer's address and ZIP code, EIN, state ID number, wages, taxes, and contact information. The form is titled 'Form W-3 Transmittal of Wage and Tax Statements 2001' and is from the Department of the Treasury Internal Revenue Service.

15	Employer's state ID number	16	State wages, tips, etc.	17	State income tax
MD	1234564564	\$	145,500.10	\$	145,500.10
		\$	145,550.10	\$	145,550.00

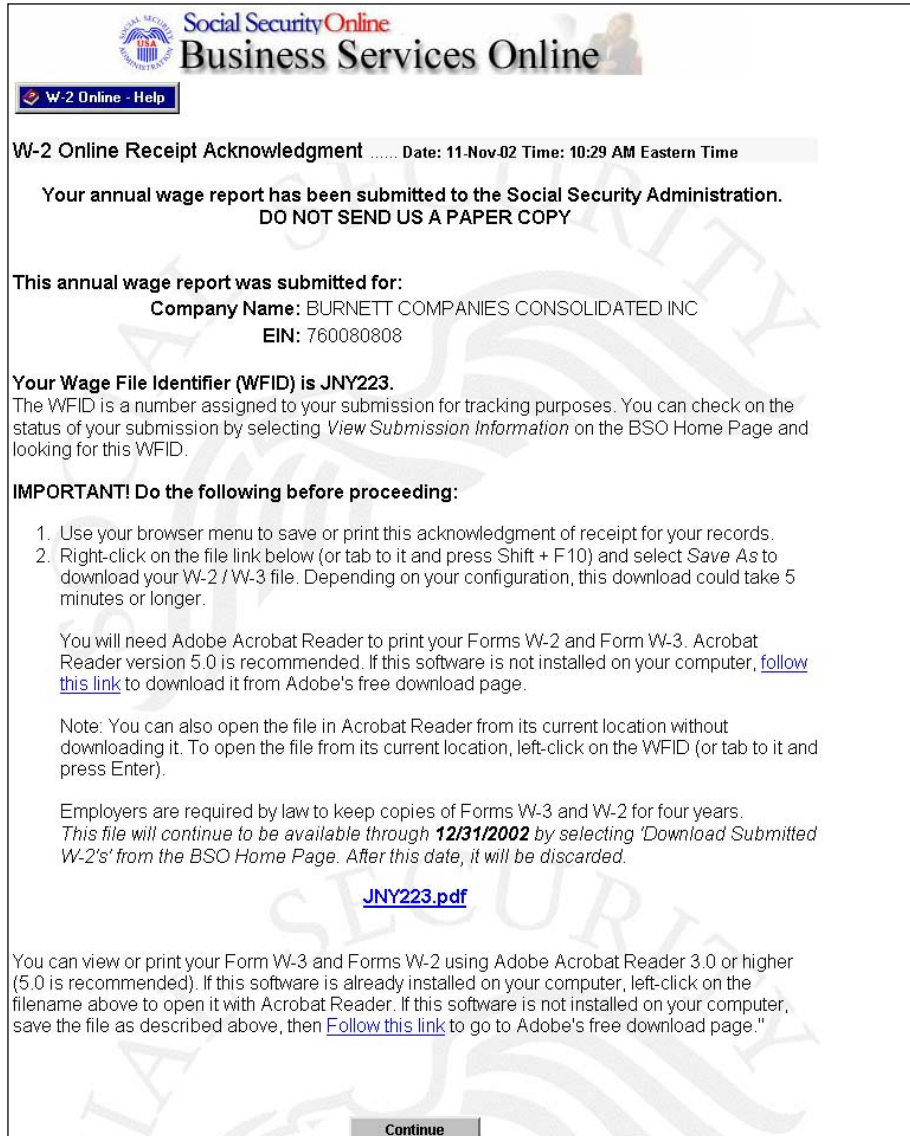
Under penalties of perjury, I declare that I have examined this return and accompanying documents, and, to the best of my knowledge and belief, they are true, correct, and complete.

Signature: _____ Title: _____ Date: _____

Form **W-3 Transmittal of Wage and Tax Statements** **2001** Department of the Treasury Internal Revenue Service

Step 18: The options on the Print Preview page will allow you to Submit your wage file to SSA, Return to the W-3 Page, Return to the W-2 page, Save your data, or Quit without saving your data.

Step 19: (Submit Wage File option) - If you select the 'Submit Wage File' option, the W-2 Online Acknowledgement page will display.



The screenshot shows the 'W-2 Online - Help' page on the Social Security Online Business Services Online portal. The page header includes the Social Security Administration logo and the text 'Social Security Online Business Services Online'. Below the header, there is a 'W-2 Online - Help' button. The main content area displays the 'W-2 Online Receipt Acknowledgment' for the date 11-Nov-02 at 10:29 AM Eastern Time. It states that the annual wage report has been submitted to the Social Security Administration and that users should not send a paper copy. The report was submitted for Burnett Companies Consolidated Inc. with EIN 760080808. The Wage File Identifier (WFID) is JNY223. The page provides instructions on how to download the file, including a list of steps and a note about the file's availability until 12/31/2002. A link to the file 'JNY223.pdf' is provided. At the bottom, there is a 'Continue' button.

W-2 Online Receipt Acknowledgment Date: 11-Nov-02 Time: 10:29 AM Eastern Time

Your annual wage report has been submitted to the Social Security Administration.
DO NOT SEND US A PAPER COPY

This annual wage report was submitted for:
Company Name: BURNETT COMPANIES CONSOLIDATED INC
EIN: 760080808

Your Wage File Identifier (WFID) is JNY223.
The WFID is a number assigned to your submission for tracking purposes. You can check on the status of your submission by selecting *View Submission Information* on the BSO Home Page and looking for this WFID.

IMPORTANT! Do the following before proceeding:

1. Use your browser menu to save or print this acknowledgment of receipt for your records.
2. Right-click on the file link below (or tab to it and press Shift + F10) and select *Save As* to download your W-2 / W-3 file. Depending on your configuration, this download could take 5 minutes or longer.

You will need Adobe Acrobat Reader to print your Forms W-2 and Form W-3. Acrobat Reader version 5.0 is recommended. If this software is not installed on your computer, [follow this link](#) to download it from Adobe's free download page.

Note: You can also open the file in Acrobat Reader from its current location without downloading it. To open the file from its current location, left-click on the WFID (or tab to it and press Enter).

Employers are required by law to keep copies of Forms W-3 and W-2 for four years.
This file will continue to be available through 12/31/2002 by selecting 'Download Submitted W-2's' from the BSO Home Page. After this date, it will be discarded.

[JNY223.pdf](#)

You can view or print your Form W-3 and Forms W-2 using Adobe Acrobat Reader 3.0 or higher (5.0 is recommended). If this software is already installed on your computer, left-click on the filename above to open it with Acrobat Reader. If this software is not installed on your computer, save the file as described above, then [Follow this link](#) to go to Adobe's free download page."

[Continue](#)

Step 20: Save your wage file by right-clicking the file name on your Receipt Acknowledgment and select the save option from your browser menu. If you do not wish to save your wage file, select 'Continue'.

(Note: Your wage file will be available for you until the date displayed on your Receipt Acknowledgement.)

Lesson 2: Resume Unsubmitted W-2s

To continue processing your Unsubmitted W-2s, you must have a Personal Identification Number (PIN) and password.

Step 1: From the Business Services Online Home Page, select the 'Resume Unsubmitted W-2s' link.

Step 2: A list of your unsubmitted reports will display.




The screenshot shows the 'Social Security Online Business Services Online' interface. At the top, there's a header with the Social Security Administration logo and the text 'Social Security Online Business Services Online'. Below the header, there's a navigation bar with a 'W-2 Online - Help' link. The main section is titled 'Unsubmitted Reports'. It contains a message: 'You have 3 saved reports that you have not yet submitted. To start a new submission press the "Start a new submission" button below. To resume a previous submission, select the "View / Edit" button next to the submission you wish to continue editing.' Below this message is a table with 3 rows of report data. Each row has buttons for 'View / Edit' and 'Delete'. At the bottom, there's an 'Options' section with two buttons: 'Start a new report' and 'BSO Home', each with a corresponding description.

Unsubmitted Reports					
You have 3 saved reports that you have not yet submitted. To start a new submission press the "Start a new submission" button below. To resume a previous submission, select the "View / Edit" button next to the submission you wish to continue editing.					
2.	BURNETT COMPANIES CONSOLIDATED INC	760080808	1	10/28/2002 12/31/2002	View / Edit #2 Delete #2
3.	BURNETT COMPANIES CONSOLIDATED INC	760080808	1	12/20/2002 12/31/2002	View / Edit #3 Delete #3

Options	
Start a new report	Start a new W-2 Online Wage Report.
BSO Home	Return to the BSO Home Page.

Step 3: You can view or edit your report. Or, you can delete the report.

Step 4: If you would like to start a new W-2 Report, select 'Start a new report'. Or, you can select 'BSO Home' to return to the BSO Home Page.



This screenshot is identical to the one above, showing the 'Social Security Online Business Services Online' interface with the 'Unsubmitted Reports' section. It displays the same message about 3 saved reports, the table of reports for Burnett Companies Consolidated Inc, and the 'Options' section with 'Start a new report' and 'BSO Home' buttons.

Unsubmitted Reports					
You have 3 saved reports that you have not yet submitted. To start a new submission press the "Start a new submission" button below. To resume a previous submission, select the "View / Edit" button next to the submission you wish to continue editing.					
2.	BURNETT COMPANIES CONSOLIDATED INC	760080808	1	10/28/2002 12/31/2002	View / Edit #2 Delete #2
3.	BURNETT COMPANIES CONSOLIDATED INC	760080808	1	12/20/2002 12/31/2002	View / Edit #3 Delete #3

Options	
Start a new report	Start a new W-2 Online Wage Report.
BSO Home	Return to the BSO Home Page.

Lesson 3: Download Submitted W-2s

Use this link to download an Adobe file containing Forms W-2 and W-3 for a W-2 Online report that you submitted within the last 30 days. Adobe files will not be available after 30 days.

(**Note:** You will need a Personal Identification Number (PIN) and password to use this service.)

Step 1: Login to Business Services Online via the Business Service Online Welcome Page.

Step 2: Select the 'Download Submitted W-2s' link from the Business Services Online Home Page.

Step 3: The Download previously submitted Wage Statements page will display.



Download previously submitted wage statements.

Right-click on the WFID (or tab to it and press Shift + F10) and select **Save As** to download your W-2 / W-3 file. Depending on your configuration, this download could take 5 minutes or longer.

You will need Adobe Acrobat Reader to print your Forms W-2 and Form W-3. Acrobat Reader version 5.0 is recommended. If this software is not installed on your computer, [follow this link](#) to download it from Adobe's free download page.

Note: You can also open the file in Acrobat Reader from its current location without downloading it. To open the file from its current location, left-click on the WFID (or tab to it and press Enter).

When you are finished you may [Return to the BSO Home Page](#).

WFID	Date Submitted
JNY327	12/20/2002

Step 4: Select the file you wish to download. Then, download the file onto your computer.